1999 ALBERTA RESIDENT MARKET IN-PROVINCE TRAVEL BEHAVIOUR STUDY
HIGHLIGHTS REPORT

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1.0 INTRODUCTION

The Alberta Government is committed to the development of an internationally competitive, environmentally sustainable and socially responsible tourism industry. For the industry to realize its full potential there was a need for a strategic approach to its future development. To accomplish this an action plan for tourism has been made to provide for marketing tourism in Alberta.

An important component of this plan is the effective marketing of Alberta to Albertans as a world-class destination close to home in the face of increasing incentives to travel elsewhere. The marketing plan intends to encourage residents to travel more frequently in Alberta and into new areas of the province. The idea is to inform the leisure traveling public of the variety of travel opportunities available in all regions of the province throughout the four seasons.

Part of the plan included embarking on an in-province travel behavior study to segment marketing activities by demography, sociography, geography, travel interests and preferences of Albertans. The research results are intended to facilitate a clearer understanding of where likely visitors live, who they are, and what motivates them to visit.

The overall objectives of the research study is to establish a clear understanding of the factors involved in motivating individuals to act upon their travel needs or preferences, and to assist Alberta tourism operators in achieving the following results:

- To increase travel by Albertans to all regions of the province
- To increase off-peak season travel in Alberta by Albertans
- To increase Albertans awareness of the quality and variety of tourism, cultural and recreational attractions throughout the province
- To influence the behaviour of Albertans to purchase their respective tourism products

More specifically, the research has six (6) main objectives;

1. To assess the present image and perceptions of the Alberta vacation product.
2. To determine the preferred image and related characteristics of vacation experiences/products for each identified market segment.
3. To measure the factors that are important to choosing Alberta destinations and determine which products satisfy what personal considerations, identify what activities or combinations of activities travelers are seeking and are the most sought after.
4. To explore the decision-making process.
5. To determine the perceptions of each market segment for various types of tourism products presently available in different regions of Alberta.
6. To determine how travel information is acquired and gather the informational requirements of the various segments, the sources they use, and the best way to disseminate travel information to each market segment.

1.1 Research Approach

To accomplish the research objectives, a multi-phased approach was used to allow for accurate understanding upon which to base decisions. This multi-faceted approach combines three different, but complimentary methodologies and includes:

Phase I: Sixty-Seven (67) in-depth interviews (IDIs) with a variety of tourism operators in all six (6) tourism regions. These qualitative interviews were exploratory in nature and helped frame and validate questions regarding tourism behaviours for the quantitative survey conducted in Phase III.

Phase II: Twelve (12) focus groups were conducted across five (5) tourism regions. These exploratory groups were conducted with residents across Alberta to look at their leisure travel preferences and habits within the province. The findings provided a starting point for finalizing the best research tool for Phase III

Phase III: Quantitative survey research was conducted with 3017 Albertans across five (5) tourism regions.

This report highlights the principal results and findings from Phase III, and the supporting information gathered from the focus group findings. The larger report should be read for full details on the regional analysis and the cluster analysis.

The exploratory survey conducted in Phase III was primarily undertaken with the objective of finding tourist market segments. This report examines awareness and perception, motivating factors that drive vacation decisions and other behavioral information. The responses of the 3017 Albertans form the basis of these findings.

Survey Methodology

In order to address the study objectives, a comprehensive survey document was developed in collaboration with representatives from Alberta Economic Development and Travel Alberta. The telephone interview technique was used to contact and complete survey interviews with the 3017 respondents, using the In-Province Travel Trips and Activities Survey (See Appendix A).

The telephone surveys were conducted between October 18, 1999 and December 3, 1999. Interviews took an average of 35 minutes to complete, with the longest survey lasting 75 minutes. Telephoning was conducted weekdays between the hours of 5:00 p.m. and 9:30 p.m. and weekends from 9:00 a.m. to 9:00 p.m. Screening criteria required the respondent to be over 18, be the person in the household with the next birthday, and have traveled within Alberta on at least one overnight leisure trip in the previous 12 months, for a distance of no less than 80 kms from home.

Sampling

As the universe for the study was all adults living within Alberta who met the screening criteria, a randomly generated sample was purchased from the TELUS list services. The

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source included all current residential telephone listings, accurate within one month of the commencement of data collection. The random sample was designed to reflect the actual population distribution within five (5) tourism regions.

Data Collection

Fifteen (15) CATI (Computer Assisted Telephone Interviewing) stations were used to allow interviewers to key answers directly into SPSS. Range checks and electronically programmed skip patterns has ensured high quality data. Data was captured at the end of each day and transferred to a larger regional database. Open-ended questions were coded and entered to the appropriate database. Interviews were conducted by tourism region and finally merged into one large database. Individual regional databases are 1.2 megabytes in size and the larger database is over 2.2 megabytes of data.

General Data Collection Comments

For the most part, respondents were cooperative in completing the survey, in particular in Alberta's South, Heartland, and North Regions. However, the termination rate was higher than normal in all regions due to the length of the survey and the time required to complete the interview. When a termination occurred, every attempt was made to make an appointment to complete that interview at a later and more convenient time.

Fielding statistics show that 13,445 telephone numbers were contacted at least one time. Overall, 22% of telephone numbers resulted in a completed interview. Of the 78% that were not completed, 58% refused participation, another 22% were ineligible, 10% of numbers were not in service, and the remaining 10% could not be reached.

Margin of Error

A total of 3017 interviews were completed and data collected using the In-Province Travel Trips and Activities Survey.

A sample size of 3017 provides an overall **margin of error at ±1.78%, 19 times out of 20.** At a 95% confidence level, these statistical parameters mean there is a 5%, or 1 in 20, probability that the sample population data would not reflect the larger population, plus or minus the margin of error; smaller sub-samples have higher margins of error.

Table One outlines the various sample sizes and margins of error for the sub-samples, and for the five (5) cluster groups that were identified from the research.

Table One

95% confidence level	Sample Size	Margin of Error
Tourism Destination Region	**N=3017**	**± 1.78%**
Calgary & Area	**400**	**± 3.27%**
Alberta's North	**401**	**± 4.89%**
Alberta's Heartland	**402**	**± 4.88%**
Alberta's South	**402**	**± 4.88%**

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Alberta's Heartland	**402**	**± 4.89%**
Alberta's South	**402**	**± 4.88%**

Edmonton & Area	912	± 3.24%
Cluster One	421	± 4.78%
Cluster Two	474	± 4.50%
Cluster Three	361	± 5.16%
Cluster Four	360	± 5.16%
Cluster Five	610	± 3.97%

Typically in public policy and marketing research the goal is to achieve a margin of error of 5% or less, at a 95% confidence level. As Table One shows, all of the key sub-samples used in this study meet the margin of error standard, with the exception of Cluster Three and Cluster Four. Given the marketing importance of Clusters, the slight variation in margin of error poses no problem for the analysis and reporting.

It should be noted that throughout the report and discussion of statistical findings, totals do not always equal 100% due to rounding and/or single or multiple response categories.

Statistical Analysis

As each Tourism Destination Region database was completed, a number of statistical techniques were used on the database. First, basic frequencies were generated and examined for errors in logic. Second, all missing data or data coded 'refused', 'do not know', and 'not applicable' is re-coded as system missing. This prepares the scaled data for further statistical examination.

Basic frequency tables were generated for each question (variables, averages {means} and standard deviations for all scaled questions). A multiple response variable was created for all questions when respondents were given the option to give an open-ended answer. (See Questions 1, 9a and 10). All of the short trip and long trip data was prepared using a basic cross-tabulation. The self-designed activity packages discussed in Q8 resulted in over 300 response codes for various activities and travel items. Because of the complexity of these answers and the sheer volume of varied responses, they were recoded into larger aggregate categories. Question 4 (a) to (i) that asked the respondent to name their favourite locations in Alberta for various activities, and their 'reasons why' it is a favourite, gathered over 600 different open-ended responses. Again, for reporting purposes the lists were re-coded into aggregate categories. Although re-coding in both of these instances was necessary for logical reporting, the raw data are still available under it's original coding and can be accessed at any time.

After this basic examination of the database, it was geographically segmented by tourism region. Comparing across regions identified patterns of similarity and difference among the tourist regions. A one-way analysis of variance determines if any significant differences exist between regions, and if they do, then chance and random error are ruled out as causes for the difference. At that point, confidence then increases that a real difference exists between regions.

Cluster One	421	± 4.78%
[illegible]	[illegible]	[illegible]
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[illegible]	[illegible]	[illegible]
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From there, cluster analysis was used to search for relatively homogeneous groups of shared characteristics within given populations. Cluster analysis classifies persons with similar habits, in this case travel activity habits, into market segments, using a number of variables to form the basis for cluster formation. For this study, the thirteen variables from Q5 Travel Factors (A to M) were used. This question asked respondents to indicate how much influence a list of certain factors have on their travel decisions. A *K-means* method of cluster classification was used to manipulate the travel data, and a series of solutions ranging from two clusters to six clusters were produced and examined. Additional analysis was conducted to determine which cluster solution provided the most useful market segments. To do this, discriminant analysis was conducted on all of the cluster solutions.

Discriminant analysis essentially tests the accuracy of the cluster classification by estimating the likelihood a respondent belongs to a particular cluster. In this study, discriminant analysis showed that the five cluster solution correctly classified 93.1% of respondents into the right cluster, and that a statistically significant difference existed between the clusters (Wilks' Lambda sig=.000). Client consultation and input resulted in selecting the five-cluster solution.

A one-way analysis of variance is used to determine if any significant differences exist between clusters for a given set of variables. If statistical differences do exist, then chance and random error are ruled out as causes for the difference between clusters and confidence that a real difference exists between clusters increases. A post-hoc statistic generated from the analysis of variance is the least-significant difference, and indicates which clusters are significantly different from each other and which ones are the same.

Additional examination of the data was done using multiple and logistic regression, but both of these techniques did not produce useful tourist profiles and were put aside in favour of focusing on the cluster analysis.

2.0 Executive Summary

This summary provides an overview of the In-Province Travel Behaviour Study conducted for Alberta Economic Development. It is intended for the reader who wants a study overview, while the detailed findings for the regional segmentation and provincial cluster analysis are presented in the full report. This executive summary reports on more general findings about Albertans taking trips in Alberta, along with some conclusions.

Province-Wide Findings

The top three influencing factors that Albertans overall consider when making decisions for taking overnight leisure trips within the province include;

1.	visits to family and friends	19%
2.	budget	16%
3.	time of year	12%

- When it comes to taking a short leisure trip within the province, which is a trip of 1 to 3 nights away from home, on average Albertans are prepared to travel for **342 kms**, or for a time period of **4 hours**. Just over half (57%) plan for a trip such as this for 1 to 4 weeks in advance. The average distance they will travel for a long trip, which is 4 or more nights away from home, is **568 kms** or **6.6 hours**. For the long trip, a high 71% will plan from 2 weeks to 6 months in advance.

- Compared to the many activities Albertans do when on leisure trips in Alberta, the top activities are visiting family and friends (75%), taking trips that involve outdoor recreation such as camping, hiking, and backpacking (67%), and visiting resort towns and attractions such as Banff, Jasper, West Edmonton Mall and other attractions (39.5%). People who visit family and friends tend to make an average of 5.8 trips per year, while outdoor recreation accounts for an average of 4.5 trips a year, and those who visit resorts and attractions make an average of 2.6 trips a year.

- The top three factors that influence people when they make decisions where to take a trip in Alberta are almost equal in importance. Cost and value for money spent and having a sense of being in a safe and secure environment both scored a mean of 3.9 out of an influence scale of 5. This was closely followed by their choice for being influenced for making a visit to family and friends at 3.8.

- Although the majority reported their main activity when traveling within the province is to visit family and friends, when asked to rate statements about traveling within the province most said that the mountains, forests and parks make a trip in Alberta special (3.7). Next to that, they like to take trips in Alberta where they can explore and do new things (3.5), and to a lesser degree they rated trips in Alberta to visit family, relatives and friends at 3.3.

- Overall, most prefer to travel and choose their activities when they get to their destination. If activity packages were available they would be more likely to consider discount packages that offer a variety of choices of activities and/or events (77%), closely followed (74%) by consideration of packages that offer tickets to a special event and include transportation, hotel accommodations and some meals. Another 70% would consider a package that offers self-guided, sightseeing tours to outlying attractions/events, and includes nightlife and hotel accommodations.

- When given the option to design their own leisure travel package for within Alberta, the top activities that were included was a variety of activities that involved outdoor recreation (28.5%); accommodations such as luxury hotels, family hotels (19%); and, outdoor summer sports such as golf, water skiing and others (14%). The rest were widely spread across a variety of activity groupings that were not singularly significant on their own.

- Generally speaking, the majority of Albertans (57%) feel they are *somewhat well informed* about travel opportunities that exist within the province, and less than a third (27%) feel *well informed*. Another 15% feel they are *not very well informed* at all about travel opportunities within Alberta.

- Word-of-mouth (47%) is the primary source of information people rely on for knowing about places to go and things to see in Alberta. While a third, 34% rely on the newspapers, 24% go to the AMA, and almost as many, 23%, go to Tourist Information Centres. The information they look for in order to plan their leisure trips are accommodations; leisure activities that are near their destination, the costs, and campgrounds and hiking trails in the area.

- The print media that Albertans rely on is highly sensitive to their geographic location. Not surprisingly, Edmonton & Area residents read Edmonton newspapers, and Calgary & Area residents read Calgary newspapers. Residents in Alberta's North, Heartland and South regions read their local newspapers, and generally the nearest large urban daily newspapers. Overall, across the province, only a third, 37%, read travel magazines. National newspapers are read with much less frequency.

- The most effective way for providing Albertans with information regarding destinations, activities and special events within the province, and the one they rely on the most is 'word-of-mouth'. In terms of formal communication channels, television rated the highest, and to a lesser degree newspapers and glossy brochures.

Regional Findings

- People who live in the Calgary & Area Tourism Region are less influenced than people from other regions by trips to visit family and friends as a factor for traveling around the province. Compared to others, they feel less informed about travel opportunities within the province, and are less inclined to rely on other people's experience. They tend to travel within the Calgary region on their leisure trips, or to Alberta's Rockies, but seldom travel too far north. Of the five (5) regions

researched they are one that travels the shortest distance for both short and long leisure trips. However, when it comes to factors that might have an influence on their travel decisions, they are no more or less influenced than other regions by specific factors such as quality of accommodations, cost/value, or variety.

- Not surprisingly, residents in Alberta's North are prepared to travel the farthest when it comes to either a short or long trip within the province. They primarily travel to Edmonton & Area, to Alberta's Rockies, to some parts of Alberta's Heartland and within their own region, but seldom travel too far south.

- Compared to other regions, people who live in Alberta's South region tend to travel most within their own region, or to Alberta's Rockies. They seldom travel north of Calgary & Area, and rarely north of Edmonton. They are also more likely to travel the shortest distance and the shortest time for either a short or long trip. Of all regions, they rated Tourist Information Centres more effective as an information source than others.

- Heartland travelers along with travelers from Calgary & Area and Alberta's South travel the shortest distance and time for both short and long trips. They seldom travel south of Calgary & Area or north of Edmonton & Area. People in this region had the highest number of parents who are not influenced by children's activities or school schedules when it comes to making travel decisions. This was surprising considering the number of households with children living at home. The most influential factor for deciding where to travel was having '*a sense of a safe and secure environment*'.

- Billboards and 1-800 numbers do not rate high as sources of travel information for Albertans, nor are they considered an effective form of communication. The AMA was rated as a more effective tool for communication for Edmonton & Area residents ahead of other community sources, and moreso than in other regions.

- The Internet was named as a source of travel information primarily by residents in the Calgary & Area region, and by Edmonton & Area respondents. It was also rated as a more effective source than others. The most mentioned 'other' positive source of communication was radio.

- For the most part, when respondents were asked why a particular travel destination was picked as a favourite, overall, it was most likely to be picked because of good camping and hiking opportunities and beautiful scenery.

- The five travel factors; quality of accommodations, cost/value for money, variety of activities, packages and discounts and awareness have the same influence across all regions.

Demographics

- Calgary & Area and Edmonton & Area Tourism regions have the youngest average population age at 41 years.
- Calgary & Area and Alberta's North Tourism regions have the highest household incomes, and Alberta's South region has the lowest household income.
- Calgary & Area and Edmonton & Area Tourism regions have the lowest number of married persons, and the highest level of singe-never married residents.
- Alberta's North and Heartland Tourism regions have the highest level of married persons, and the lowest level of single-never married residents.

Cluster Profiles

This section briefly profiles the five clusters or market segments identified in the in-province travel population. A summary table setting out, and comparing, all of the characteristics of each cluster can be found in the following pages;

Considering the official population list provided by Alberta Municipal Affairs, 1998 Census the current population of Alberta is 2,764,312. Projected onto the larger provincial population the approximate breakout within each cluster is as follows;

Cluster Name	Percentage of Population	Population
Cluster One	19%	520,730
Cluster Two	21%	586,285
Cluster Three	16%	446,516
Cluster Four	16%	445,280
Cluster Five	27%	754,501

To put a face to the clusters, names were assigned that are indicative of the key characteristics that make them uniquely different as a group. These names include;

Cluster One - The Young Urban Outdoor Market
Cluster Two - The Indoor Leisure Traveler Market
Cluster Three - The Children First Market
Cluster Four - The Fair Weather Friends Market
Cluster Five - The Older Cost-Conscious Traveler Market

The Young Urban Outdoor Market [Cluster One]

The youngest of all clusters (average age 37.5 years), the Young Urban Outdoor market is made up equally of males and females living in Edmonton & Area and Calgary & Area regions. Over 20% are single. A polar income structure affords some of this cluster the money to travel while others are looking for discounts and coupons. An important niche within the cluster is the young student population with time and dollar constraints. School schedules, visits to family and friends, and budgets, are all factors that influence the decision to take a trip. These sporty life lovers are very active outdoor enthusiasts.

Whether it is recreation, winter sports, summer sports or leisure activities the Young Urban Outdoor market does it outdoors. Camping, hiking, golfing, fishing, skiing, horseback riding, concerts and music festivals, shopping, rodeos and sports tournaments span a wide range of activities the Young Urban Outdoor market does when they take an over-night trip in Alberta. To them, mountains, forests and parks make a trip in Alberta special. The Rockies, Banff and Jasper provide the mountains, foothills and beautiful scenery that make these places favorite locations. The Young Urban Outdoor market strongly agrees that taking a trip to explore and do new things is a primary motivation to action. Word-of-mouth is not only a key source of travel information, but it is also the most effective way to communicate with the cluster. While almost one-quarter of the Young Urban Outdoor market uses the Internet as a source of travel information, it is only moderately effective as a way to communicate to them. Of all clusters, this market segment shows the highest use of the Internet for getting travel information. What type of information are they looking for? Accommodations, price and campground/hiking trails are three types of information the Young Urban Outdoor market looks for.

Who are they? Young, urban, outdoors, active, and wired.

The Indoor Leisure Traveler Market [Cluster Two]

The second youngest of all clusters (average age 40.5 years), the Indoor Leisure Traveler market is very much a female cluster; almost 70% are female. Married, with children and lower household incomes, this cluster lives more in the non-urban regions of Alberta's North, Heartland, and South. Budget and visiting family and friends are key factors affecting their decision to travel. The Indoor Leisure Traveler market is very much leisure oriented. Indoor museums and resorts are all key activities they like to do when on an overnight trip in Alberta. The Rockies, Edmonton, Drumheller and Jasper provide the mountains, foothill attractions and beautiful scenery that make these places their favorite locations. Willing to travel further in distance and time than other clusters, the Indoor Leisure Traveler likes shopping, fine hotels, horseback riding, sightseeing and campfires. What communication channels are effective in getting information to this cluster? Traditional forums and media such as word-of-mouth, television and magazines are key sources of travel information for the Indoor Leisure Traveler market. This highly female, low-income non-urban cluster with family and kids, want to get away and pamper themselves with shopping, fine dining and touring around. Although they travel with the family, they want to do separate activities from the children.

Who are they? Low-income, indecisive travelers.

The Children First Market [Cluster Three]

The Children First market is the only cluster to say children's sports and competition schedules have a high influence on them taking trips in Alberta, and where they take trips in Alberta. Either male or female, with an average age of 42.5 years, this cluster is married with more children than any other cluster. Spread around all tourism regions, the Children First market has the highest income of all clusters. Consequently, budget is not a factor that influences travel decisions. Children's events and visiting family and friends are key factors for them in deciding to travel around Alberta. While travel activities range across the outdoor spectrum, activities for the Children First market tends to revolve around children and family. The cost of a trip does not stop them from taking a trip and they are not apt to use discount coupons. Banff, Jasper, Kananaskis and Edmonton are all favorite locations where they like to camp, hike, golf and shop. Attending sports tournaments, music festivals, and the Royal Tyrrell Museum are occasions that make these favorite locations special. Word-of-mouth, newspapers and the AMA are key sources of travel information. Word-of-mouth and television are the most effective ways to get information about accommodations, prices and "leisure activities" to the Children First market.

Who are they? Well-off, middle-class, traditional Alberta families.

The Fair Weather Friends Market [Cluster Four]

The second oldest cluster (average age 44 years), the Fair Weather Friends market is only influenced to travel by family or friends and weather conditions. With a low marriage rate, few children, and slightly more males in the cluster, visiting family and friends is a key factor in making a travel decision. With moderate level incomes and few budget concerns, the Fair Weather Friends market has the time and resources to travel. While the cluster does participate in a full range of activities when on a trip, their incident rate of activities is lower compared to the previous clusters. Banff, Kananaskis, Lake Louise and Edmonton are favorite locations for them to camp, hike, ski, golf, fish, hunt, sightsee and horseback ride while visiting family and friends. The best informed of all clusters, the Fair Weather Friends know a lot about the province and places to visit. Word-of-mouth, newspapers, Internet and tourist information centres are key sources of travel information for this cluster; however, word-of-mouth and television are considered the most effective by this cluster. They look for information on accommodations, leisure activities near their destination and for campground/hiking trails.

Who are they? They have been there, done that, seen it all, and 'have the T-shirt'. The Fair Weather Friends market may not travel a lot, but they are active when they do travel.

The Older Cost-Conscious Traveler Market [Cluster Five]

The oldest cluster (average age 45 years), the Older Cost-Conscious Traveler market is influenced by cost/value for money spent and the sense of a safe and secure environment. This slightly female oriented cluster is married, but with a high divorced,

widowed and/or single status. Their mid to lower incomes is reflected in their budget and travel expense concerns along with a high coupon use. While outdoors oriented, the Older Cost-conscious Traveler market is more likely to take part in summer sports and leisure activities when traveling in Alberta. Banff, Lake Louise and Jasper are favorite locations to camp, hike, ski, golf, horseback ride, shop and sightsee. With more information and awareness of travel opportunities, the Older Cost-Conscious Traveler market would take more trips. Word-of-mouth, newspapers, AMA, Tourist Information Centres, and television are key sources of travel information. But, again, word-of-mouth and television are the most effective means for getting travel information to this cluster group. Accommodations, prices, and leisure activities near their destination are the types of information this cluster looks for.

Who are they?. Older working women and men with budget and personal security concerns.

The Tables on the following pages summarizes the key attributes for each cluster.

CLUSTER/MARKET SEGMENT SUMMARY

Cluster One Young Urban Active Outdoor N 520 230	*Cluster Two* Indoor Leisure Traveler N 586 285	*Cluster Three* Children First Traveler N 446 516	*Cluster Four* Fair Weather Friends N 445 280	*Cluster Five* Older Cost Conscious Traveler N 754 501
18.9%	**21.3%**	**16.2%**	**16.2%**	**27.4%**
DEMOGRAPHICS				
M=49% F=51% Average Age: 37.5 12% under $25,000 16% $100,000+ 66% Married 23% Not Married Children: 54% Edmonton: 38.5% Calgary: 32% North: 14% South: 8% Heartland: 8%	M=31% F=69% Average Age: 40.2 12% under $25,000 9% $100,000+ 70% Married 13.5% Not Married Children: 63% Edmonton: 25% Calgary: 23% North: 18% South: 17% Heartland: 17%	M=50% F=50% Average Age: 42.5 7% under $25,000 19% $100,000+ 75% Married 9% Not Married Children: 66% Edmonton: 30% Calgary: 27% North: 15% South: 13% Heartland: 13%	M=59% F=41% Average Age: 44.2 10% under $25,000 13% $100,000+ 62% Married 21% Not Married Children: 33% Edmonton: 34% Calgary: 27% North: 16% South: 12.5% Heartland: 11%	M=44% F=56% Average Age: 44.8 11% under $25,000 11% $100,000+ 62% Married 18% Not Married Children: 30% Edmonton: 33% Calgary: 28% North: 14% South: 13% Heartland: 12%
DECISION FACTORS (IN ORDER OF INFLUENCE) IN DECSCENDING ORDER				
School Holidays Cost/Value for Money Spent Sense of Safe and Secure Environment Visit Family & Friends Weather Conditions Variety of Activities Offered	Sense of Safe & Secure Environment Cost/Value for Money Spent Weather Conditions Packages or Discounts Visit Family & Friends Quality of Accommodations Children/Family Activities School Holidays Large City Attractions Small Town Events & Attractions	Children's Sports/ Competitions Sense of Safe & Secure Environment Cost/Value for Money Spent Children/Family-Oriented Activities Visit Family & Friends Variety of Activities Weather Conditions School Holidays	Visit Family & Friends Weather Conditions	Sense of Safe & Secure Cost/Value for Money Spent Weather Conditions Quality Accommodations Visit Family & Friends
TRAVEL STATEMENTS				
Mountains, forests and parks Explore and do new things	Mountains, forests and parks Explore and do new things	Mountains, forests and parks Explore and do new things	Mountains, forests and parks Explore and do new things	Mountains, forests and parks Explore and do new things

Cont'd

Note: The N= at the top of each column refers to the provincial population that falls into these clusters. The % represents the percentage of the population who are likely to fall into the individual clusters.

SUMMARY CONT'D

Cluster One Young Urban Active Outdoor N 520,730	Cluster Two Indoor Leisure Traveler N 586,285	Cluster Three Children First Traveler N 446,516	Cluster Four Fair Weather Friends N 445,280	Cluster Five Older Cost Conscious N 754,501
TRAVEL PRODUCTS (TOP FOUR)				
Visiting Friends and Relatives Outdoor Recreation Resort Towns & Attractions Indoor Leisure Activities	Visiting Relatives & Friends Outdoor Recreation Indoor Leisure Activities Resort Towns & Attractions	Visiting Relatives & Friends Outdoor Recreation Resort Towns & Attractions Indoor Leisure Activities	Visit Family & Friends Outdoor Recreation Outdoor Summer Sports Outdoor Leisure Activities	Visit Family & Friends Outdoor Recreation Resort Towns & Attraction Indoor Leisure Activities
ACTIVITY PACKAGES (Would Consider)				
Discount Packages with Variety Tickets to Special Events With Extras Self-Guided Tours Hiking, Lodging, Catering, Campfires & Cabins	Discount Packages with Variety Tickets to Special Events & Extras Self-Guided Tours Hiking, Lodging, Catering, Campfires & Cabins Shopping, Theatre, Fine Dining, Hotels Separate Activities	Discount Packages with Variety Tickets to Special Events & Extras Self-Guided Tours Hiking, Lodging, Catering, Campfires & Cabins	Tickets to Special Events & Extras Discount Packages Self-Guided Tours Hiking, Lodging, Catering, Campfires & Cabins	Discount Packages Tickets to Special Events & Extras Self-Guided Tours Hiking, Lodging, Catering, Campfires & Cabins Shopping, Theatre Fine Dining & Hotel
SELF DESIGNED PACKAGE (in order of preference)				
Outdoor Recreation Accommodation Outdoor Summer Sports Outdoor Leisure Activities Meals	Outdoor Recreation Accommodation Outdoor Leisure Activities Outdoor Summer Sports Meals	Outdoor Recreation Accommodation Outdoor Summer Sports Outdoor Leisure Activities Meals	Outdoor Recreation Outdoor Summer Sports Outdoor Leisure Activities Accommodations Meals	Outdoor Recreation Accommodation Outdoor Summer Sports Outdoor Leisure Activities Meals
SOURCES OF INFORMATION (in order of preference)				
Word-of-Mouth Newspapers Tourist Info Centres Internet Other (Radio & Travel Alberta) AMA	Word-of-Mouth Newspapers AMA Tourist Info Centres Other (Travel Alberta & Radio) Television	Word-of-Mouth Newspapers AMA Other (Prior Exp & Radio) Internet Outdoor Leisure Activities	Word-of-Mouth Newspapers Other (Radio & Prior Exp) Internet Tourist Info. Centres AMA	Word-of-Mouth Newspapers AMA Other (Radio & Prior Exp) Television Internet
EFFECTIVE COMMUNICATION METHODS				
Word-of-Mouth Television	Word-of-Mouth Television Campground Guides Tourist Info Centres Newspapers AMA Glossy Brochures Magazines	Word-of-Mouth Television	Word-of-Mouth	Word-of-Mouth Television

Conclusions

1. A broad range of similarity exists across the province, in all regions and in all clusters, regarding travel decision factors, favorite travel locations, sources of travel information and effective communications channels.
2. Visiting family and friends is the primary motivator for taking leisure trips in Alberta, and it is also the activity with the highest number of average trips per year (6 trips).
3. Even when budget is a key-influencing factor, travel in off-peak time is not an option for most people because of school, job schedules and weather conditions.
4. Despite high-income levels within certain regions and clusters, budget and price are still a concern, making discount packages attractive to most travelers.
5. Travel packages are acceptable to Albertans, but they do not want rigidly scheduled activities as part of that package. Instead, they want to explore and do new things!
6. Outdoor recreation activities, especially camping and hiking, are important activities sought by Albertans travelling in the province.
7. The best way to communicate travel information to Albertans is by word-of-mouth and television.
8. West Edmonton Mall is a significantly favoured location, and a key reason why Edmonton is a more favoured travel destination than any other center in Alberta.

3.0 Focus Groups

Twelve (12) focus groups were conducted between September 24, as a key starting point in the design of the quantitative survey conducted with the 3017 Albertans. These focus groups were conducted with a cross-section of participants representing the following breakout;

- Participants 18 - 35; Single or married without children
- Families with children under the age of 18
- Couples 45+ without children and empty nesters

Final breakout of location and group composition is as follows;

LOCATION	COMPOSITION	DATE
Calgary	Family	September 3, 1999
Calgary	Young Adults/Couples– No kids	September 30, 1999
Calgary	45+ - No kids/empty nesters	September 30, 1999
Edmonton	Young Adults/Couples – no kids	September 28, 1999
Edmonton	45+ - no Kids/empty nesters	September 28, 1999
Edmonton	Families	October 4, 1999
Lethbridge	Families	September 24, 1999
Medicine Hat	45+ - No Kids/empty nesters	September 25, 1999
Edson	Families	September 27, 1999
Red Deer	Young Adults/Couples– No kids	September 29, 1999
Grande Prairie	45+ - No Kids/empty nesters	October 5, 1999
Fort McMurray	Young Adults/Couples – No kids	October 6, 1999

The objective for conducting this qualitative exploration of the decision-making process of Albertans was to generate an extensive list of the factors involved when selecting vacation destinations in Alberta. One Hundred and Forty (140) participants took part in the groups.

The following provides a summary of the focus group discussions according to the objectives established for this project:

GENERAL FINDINGS

- Albertans do not like crowds, regardless of their age group or the region they live. They avoid trips during peak times to destinations such as Banff, and many also avoid annual events like the Calgary Stampede and Klondike Days. They see these big-ticket events as more of an attraction for tourists from outside the province and the country, or for the more immediate local residents.

- Albertans are great campers and hikers, but most avoid privately operated campgrounds for a variety of reasons. They do not like what they describe as too many restrictions, for example, the requirement to only purchase firewood from the operator. They resent paying a fee to use the washrooms and the extra

fees for their dogs. They particularly dislike having to pay to use the washrooms because they are not maintained and are not clean. Many families and singles, or young couples, appear to avoid utilizing these facilities and look for camping areas without amenities to avoid the extra costs and feeling harassed. They feel all of these things have influenced Albertans to travel less at home, or to be selective about where they do go within the province.

- Regardless of their age group, they feel there is a need for more rest stops along the way and felt strongly enough about it to draw comparisons of Alberta to other provinces and the USA. They want more than a patch of land when they get to the rest stop and feel rest stop amenities in general are lacking. They would like to see more picnic tables, washrooms and information booths. They believe Alberta has the best highways and has more to offer than other provinces, but these missing amenities make traveling in Alberta difficult for these travelers.

- Many participants reported visiting friends and family as their primary purpose for leisure travel in Alberta over the past 12 months. Next to visiting family and friends specific purposes for leisure travel by families included special school competitions or events, general vacation and getaway weekends. Singles, couples and those over 45, next to visiting family and friends like to "*experience different things*".

IMAGE AND PERCEPTIONS OF ALBERTA VACATION PRODUCTS

- There was no consensus on the definition of holiday versus vacation. There were some who saw them as being the same, and defined both as simply time away from work. Others related a vacation to a specific season of the year, or a time when they regularly make a trip to a particular place. For those who saw them as different, a ***holiday*** was defined as one day off work and often tied to a long weekend; a time for obligatory family visits; or, a short weekend trip. For these people, a ***vacation*** has a more distant destination; is for a longer period of time; does not include obligatory visits, and takes more planning.

- Some reported taking as few as two (2) short trips a year to a location in Alberta while others reported eight (8) to 12 trips. The more avid campers and hikers reported taking as many as 20 to 30 short weekend, or overnight trips, to different parts of Alberta over a 12 month period. A small number make a short trip every weekend. Most of their travel occurs during the third quarter of the year, and more specifically during July through September. The exceptions are the passionate winter and summer sports participants, who travel summer and winter, regardless of the weather or season.

- When it comes to planning a vacation or holiday within Alberta, there was again a wide variation of answers depending upon the age group and their lifestyle. Holiday planning can range from as far in advance as two (2) weeks for a weekend trip, down to a couple of hours for those who travel on impulse. Longer trips around the province take more planning and often require a couple

of months. Some have to plan as far ahead as six or more months depending on scheduling requirements at work, or for budgeting purposes. Overall, planning short trips in Alberta is less demanding.

> *"We get ready and go in an hour. If we stop and plan, we'll talk ourselves out of it."*

- The words *Alberta Vacation* meant a variety of things; it either meant a specific place or certain attributes; these varied depending upon the tourism region of the respondent. Those who thought of specific activities named *skiing, hiking* and *camping*, while others thought of places such as *Kananaskis, Banff, and Waterton*. There were others who gave answers that related to an aesthetic experience such as; *mountains, trees* and *parks*. Yet another group focused on an 'escapist' aspect of the travel experience, and described an Alberta experience as a *discovery, exploring,* and *appreciating what Alberta has to offer*. Other words used to describe an *Alberta Vacation* include, *quiet, peaceful, healthy, pristine*, and *safe*.

- Comparing Alberta to other vacation spots in Canada, and to border USA destinations was difficult for most, so little was learned. Those who did respond, tend to believe that few other spots compare to Alberta with the exception of perhaps B.C. An anomaly was people who have moved from other provinces for the sole purpose of finding work. These participants were inclined to rate their home province more favourably over Alberta. Although the U.S. is appreciated for their good service, and "know-how" when it comes to tourism, those who ventured a comparison see Alberta as *"safer, cleaner and less commercialized"*.

- Clearly, natural beauty remains the prime motivator for choosing the destinations they do, and many maximize on that by camping. When they think of an Alberta vacation they think of *"relaxation"*, *"peacefulness"*, and, *"natural beauty"*. Others describe it as always having somewhere different to go and something new to see. They used words like *"unspoiled"* and *"new discoveries"*. Most are looking for something new and different.

> *"I want to explore and do new things."*
> *"I think of rest, relaxation and tranquility."*
> *"I see it as going to see something new every time."*

VACATION EXPERIENCES & CHARACTERISTICS

- Again, there was no consensus on what participants defined as tourism seasons in Alberta; some see two (2) seasons, but more see four. Those who saw two (2), were inclined to associate their response to the weather, while those who said four (4) were more focused on the activities they do during each season. They were also the same people who have lots of activities planned for their trips. A number who will only travel during off-peak times see that as the only tourism season in Alberta. Families had more difficulty thinking within the framework of tourism seasons, as they are controlled by the need to plan around

school breaks and school events.

- Those who believe there are four (4) tourism seasons, listed their winter activities as skating, skiing, snow boarding, camping, hiking and hunting around Alberta. In the summer they go to the lakes, backpack and hike. Spring season includes activities such as going to rodeos and baseball tournaments, and biking, while in the fall they hunt and go to local fairs.

- Enjoying the countryside in general is the most popular activity, and appreciation of the factors relating to the natural environment is all very high. The exception is the weather, which detracts some from taking many trips, particularly in the colder months. The state of public washrooms and available or free campgrounds are all key factors for those who like to camp.

- Favourite vacation destinations in the winter varies depending on the region and the life stage of the participant. Families in Alberta's South region named; *Writing-on-Stone Park, Waterton Lakes, Cypress Hills, Drumheller* and local campgrounds as their favourite destinations in the summer and *West Edmonton Mall* and the *Edmonton Space & Science Centre* in the winter. Most families who have children involved in sports events or other competitions spend a lot of weekends in various towns around Alberta. When they can, they plan to take in surrounding events or activities during those weekends.

- Older focus group participants in the 45+ age group did not mention places like West Edmonton Mall as a popular destination, but talked about taking nature trips, making visit to historical sites and just generally enjoying the countryside as the most popular things to do. Most of these travelers, however, do not just want to look at scenery, they want to take part in activities and *"have an experience"*. Some just like to drive around and stop when they see something interesting or new to do; others travel around to country fairs, rodeos and to local celebrations.

- Families, singles, couples and those 45+, all named local camping areas; such as, *Kananaskis, Banff, Lake Louise, Jasper* and *Waterton* as favorite spots during the winter and summer. In the summer, families camp and hike and make plans around their children; singles and couples without children, or with grown children, tend to hike, camp, bike and golf around Alberta. In the fall, families and the 45+ age group take in fairs, sports events and local rodeos. Visiting museums and historical sites are a favourite activity, primarily for older adults year-round, and families during the summer months. They would like to know more about more historical sites, since they feel some are overlooked and poorly advertised.

- In Alberta's Heartland, families in Edson appeared to take the most weekend trips of any of the groups that do not typically include activities or attractions in major centres. These trips were closely focused around the northern part of Alberta and into the nearby forestry areas. They do activities such as hiking, backpacking, snowmobiling and skiing in the winter, and hiking, backpacking and quadding in the summer. Favorite destinations for this group includes the

Cadomin Caves, Wolf Lake, Jasper during off season, and occasionally to *Edmonton* for the *Space & Science Centre* and other cultural events. As for the more central part of this region, participants from Red Deer & area prefer to camp and hike west along the Forestry Trunk Roads and along the David Thompson Highway, or take trips to Calgary. They like *Banff* and *Jasper*, but have spent little time traveling in southern Alberta. To pique their interest, they would have to be convinced there is something to do in southern Alberta outside of Waterton Park.

- Participants in Edmonton & Area are most likely to go to *Jasper*, the *Columbia Ice Fields* and *Banff* to ski and do other winter activities. They prefer to hike and camp around the central and western parts of the province, and they go to Calgary for entertainment and concerts. A few mentioned Drumheller and Waterton Lakes as a destination, but most were unfamiliar with other parts of Southern Alberta and their attractions, or the more easterly parts of Central Alberta. When it comes to traveling north of Edmonton several mentioned *Grande Prairie and Wood Buffalo National Park*, but going north of Edmonton was considered too far to travel, and not on many of their lists of places to go and see.

- In Calgary & Area, popular destinations and activities include *Kananaskis*, and into the forestry areas for cross-country skiing, camping, backpacking and hiking in the Foothills and mountains. A favourite inside leisure destination for families in these groups is the West Edmonton Mall, but was not a destination mentioned often by the 45+ group, or singles and couples between 18 and 35. Participants over 45 almost all prefer to camp and hike, taking in such activities as bird watching, golfing and fishing. They expressed a great appreciation for what Alberta has to offer in natural beauty, and used words like, "*everything is so unspoiled – it's like a discovery*". They are more likely to visit Lake Louise or Jasper ahead of Banff because they feel like they still belong to Albertans. They echoed participants from other focus groups in feeling that Banff is too commercialized, and is there for the international visitor; not for Albertans.

- Clearly, overnight leisure visitors have a higher incidence of travel during the summer and a much lower incidence of travel during the winter and fall. Most tend to make these trips during the July to September period. The exceptions are the outdoor activity crowd who ski, skidoo and enjoy other outside sports. For most, weather is a driver for when they plan their trips, both short and long. There was a high incidence of travelers who stay in non-commercial accommodations and campgrounds. They either stay at the homes of friends or relatives, or in tents outside of the private campgrounds. Overnight trips are spent anywhere from car camping to holiday trailers at the side of a forestry trunk road.

DECISION-MAKING PROCESS

- Decisions are made jointly between couples and among friends when there are no children. Regardless of which region they live, families tend to make their vacation plans around family activities, school events and competitions. Most families appear to be active and involved in a number of sports and other competitions, which can take them around the province. Family travel decisions are also influenced by school breaks and summer vacation.

- The main influencers for choosing where leisure travelers go on a vacation is fairly equal between time and cost. Families are more inclined to consider cost ahead of time. Others are more concerned with not having to spend more than 3 hours driving to a destination on a short trip. Both tend to limit how often, if ever, they travel to farther corners of the province. If they plan to travel farther it is more often saved for a week trip, or one that would be considered a long trip. Even then, there has to be a reason for them to go to a farther destination; at most they will travel 5 to 6 hours. Previous knowledge and scenery are a principal reason given for choosing where they take these trips. A significant number of participants in all groups like to visit undeveloped natural areas, which is a main attraction. When they discover a new place to explore they are reluctant to talk about it, and hope not too many find out about this secret spot.

- Given the outdoor nature of many of the overnight short trips they tend to travel in regions that offer the widest variety of outdoor activities. More commercialized destinations like Banff and Jasper are seen as too expensive and too crowded to be attractive.

  Overall, two other important factors that impact travel within the province is personal safety and the price of accommodation. In general, they feel safer traveling in Alberta than other places, but they feel the price tag for commercial accommodation, including campground fees, are too high.

Families

- Parents agree that children are highly influential in making decisions about destinations. They are looking for outdoor activities of all types ranging from water based to hiking and outdoor adventure, cycling, snow skiing and boarding. Whatever the activity, parents are looking for *" something we can do with our kids"*. Next to visiting family and friends, specific purposes for leisure travel by families include special events, general vacation and getaway weekends. Vacations with a variety of family interests appeal to them.

- Parents feel that travel is an experience children should have, as well as being a positive force for bringing the family close together. It was clear that as long as the children are at home, travel would be focused around their activities and plans. As families, they tend to take leisure trips around sports events, theme parks, and beach and water park activities. These trips range from facility based activities to exercise in general; hiking and outdoor adventure; bicycling; snow

skiing and boarding; and playing tennis and golf. Trips with a variety of family interests appeal to them on a whole. Rather than visit the same place each year, they look for something new and different where they have not been before. Interesting things for children to do, along with value for money are high priority. When it comes to accommodations they tend to favour family hotels, motels and tenting. They plan and budget for holidays, and put emphasis on security, safety and reliability. They plan in advance, and require detailed information on routes and accommodations to do this planning.

Young Adults – No Kids (18 to 35)

- The younger single market segment, 18 to 35 years of age, are interested in accumulating experiences and traveling with friends while budgeting on accommodation. The 18 to 35 year old couples with no kids are young and like to live an experiential lifestyle. They seek new and different things, and they are either on a fixed budget or have money to enjoy themselves at a destination. They are looking for continuous new experiences, adventure, action, fun and excitement. *"I like to go places where I don't know anyone, where I don't see people. I just want to go where it is quiet and basically still pristine"*. They also like to go to places that are not always pristine and majestic. One favourite place mentioned in southern Alberta is Writing-on-Stone Provincial Park. It is not as crowded as other places and is smaller, but with unusual and outstanding scenery. *"It is smaller and the scenery is spectacular, but not spectacular in the conventional way. It is different".*

- Core groups of younger people look for nightlife whenever, and wherever, they go on both short and long trips. In this segment there appears to be a trend to take a lot of short trips to the same places. They like them because they know them and because they are affordable. " *Traveling Alberta is what we do when every other place is too expensive. I don't think there is anywhere around Alberta that I really want to go, that I haven't been before. We usually go back to the same places because we know what is there and we have fun."*

- Shopping, cultural events and nightlife are a main attraction for this group of travelers, and they tend to head to the larger centres to satisfy all of these preferences. Value for money was mentioned often when making choices about were they would take a trip.

45+ - No Kids/Empty Nesters

- The 45+ participants tend to travel more than others to historical sites and museums. They go in tents and holiday trailers, and take more time to visit theme parks and places of interest than other travelers. It was apparent that work commitments, the need for stress relief and decreasing leisure time, all are contributing to growth in the short break market, and this group in particular is participating.

- They enjoy exploring and are interested in doing different things, with a preference for planning their leisure travel. Regardless that they do a lot of traveling in the province, they have been to the most places and are anxious to hear about new places to go; this group does not venture too far into the more distant corners of the province. This group relies heavily on the AMA as an information source for their travels.

PACKAGES

- Although most started out making it clear that, "*We are not package people*", they were all intrigued by the idea of packages that offer value. However, they do not want to be tied to scheduled tours or places to be at a certain times. To them a package that would appeal will save them money, but at the same time not restrict their activities. Families liked the idea best, while the 45+ groups were less inclined to be interested in the overall concept. "*We like to make our own schedule. I think a holiday, by definition, is to be able to do what you want, when you want.*" Most recognize that some events require scheduling, but they prefer the freedom of doing them when they want. Their preference is a combination package of activities with some flexibility on times; such as, choosing when they go to an attraction like Heritage Park or the Edmonton Space & Science Centre.

- Families want a combination of safety and trust built into their packages. They "trust Disneyland" and feel safe there; they want that same feeling at home, and will spend more for that safe environment. They feel Americans are better at packaging activities and events than Canadians, and that Alberta is less organized than most when it comes to advertising what is available in the province. They believe more marketing has to be done with emphasis on key elements such as safety and value to gain the trust of local travelers.

- People liked the idea of hotel and activities packages that could include a free meal, or free breakfasts. Families are attracted to packages that offer discount coupons. Advertised discounts and packages would encourage them to go to an event or choose a destination. "*I like packages where you have choices and where you can combine things that you like to do.*"

- It was suggested that a theme could be developed around a sporting event or the theatre to offer as a package. They want it simple, but they also want value. They do not believe a sole operator can make a living without doing a joint venture, because they are only offering one activity and most people like to do more. An example given was horseback riding which may only be appealing to one or two family members. They saw the possibility that adults could go riding, and the children could be taken on an educational tour on farming and ranching.

- Discussions in Calgary revealed a desire to get a discount wherever you go in Alberta simply because you are an Albertan. Examples were given of other provinces where producing a local drivers license qualifies you for an automatic 50% discount. This revealed an underlying annoyance towards being charged a

$10 fee to enter Banff National Park. Both families and the 45+ age group echoed this concern. Younger couples, or singles simply avoid Banff because of the expense. Families particularly were upset that reduced rates are offered to students during off-season, while it is unaffordable for them during peak season. They feel lesser rates should be an automatic privilege offered to Albertans regardless of the season. Most said they avoid Banff as a result. Although older age groups without children spoke about how they avoid Banff in the peak summer months and dislike the commercialization, they still visit off-season regardless of the fee.

INFORMATION

- Information on travel in Alberta is gathered in a variety of ways; the most popular ways to receive this information is by;
    - Word-of-mouth
    - AMA
    - Tourism Information Centres
    - Brochures
- Most were unfamiliar with the 1-800 number and some who were familiar had bad experiences. Others only use it for finding out about accommodations. They do not find it particularly useful or accommodating because of the limited hours of operation.
- The general consensus is that there is not a lot of information available about things to do in Alberta, but there are still a lot of well kept secrets that are poorly advertised. The bottom line is people would do more if they knew about all of the things to do.
- Discussions led to concerns and complaints about the Information Centres in particular the hours of operation compared to those in B.C. and in the USA. It was noted that in other locations these centres are open until 10 or 11 in the evening, while Alberta centres all close at 5:00 p.m. They also felt that many are hard to find as they are often tucked away on a side street in some small town without proper directions; and, in larger centres they even harder to find. They feel they should always be located at the entrance to a town or city, and always on main thoroughfares.
- The idea of a monthly events calendar as an information source that would list all upcoming events, activities and key destinations in Alberta was very appealing. It was suggested that one large calendar might be overwhelming and that it might work better to have a calendar for sporting and outdoor activities and events, and one for cultural activities and events. They felt *"you could match it to your lifestyle, and it would be something people would keep around".*

- The idea of an Internet site for Travel Alberta was appealing to most regardless of their age category. Some felt it should be regularly updated to reflect pricing etc. so they would always be aware of what to expect. It was suggested that the Internet would be an appropriate venue for the events calendar and could easily be updated.

- When it comes to brochures they believe they need to be both glossy and picturesque as well as full of content. They feel the picture is needed to attract you to the opportunity in the first place, and from there they want lots of content including prices. They want current brochures, and they want the pictures to be believable.

POPULAR EVENTS/ACTIVITIES

- One-time events have to be a big attraction for people to plan trips around on event (large attractions were considered something like The Olympics). For families with children and the 45+ age group without children, one-time events such as the Grey Cup, Figure Skating Championships, and the Canadian Curling Championships are often selective to one family member and difficult to make plans around. This was a time when the idea of a package became appealing. They thought a fan could attend the event, and the other family members could do things of their choice such as the theatre, shopping or going to places Calaway Park, Heritage Park, Edmonton Space & Science Centre, West Edmonton Mall, and so forth.

- The most popular events for weekend trips include Edmonton Festivals, rodeos, country fairs and air shows, and, West Edmonton Mall.

- Some examples of specific places and destinations that some people plan to visit or would like to visit in the near future include;

    - Alberta Prairie Railway Excursions in Stettler
    - Royal Tyrrell Museum and the Badlands
    - Emptee Town and other ghost towns around Alberta
    - Skoki Lodge
    - Ft. McMurray Tar Sands tours
    - Cadomin Caves
    - Writing-on-Stone Provincial Park
    - Grande Prairie to golf
    - Rosebud Theatre
    - Edmonton Festivals

- Albertans are looking for an experience, and are activity oriented regardless of their age. Favourite activities include;

  - Hiking
  - Visiting Museums
  - Backpacking
  - Going to National Parks
  - Camping
  - Kayaking
  - Visiting Historical Sites
  - Exploring and Discovering

APPENDIX A

Survey Document

Survey # _____

Region _____

In-Province
Travel Trips and Activities Survey
Questionnaire

Hello I'm _____; with International Results Group, a marketing research company in Calgary. Your household has been selected to participate in a province wide survey for Alberta Economic Development and Travel Alberta. The results of this research will assist Travel Alberta in increasing awareness of travel and tourism opportunities for Albertans within the province.

We would like to speak with the person who is 18 years or older and who's birthday is next.
[Establish contact, re-introduce project]

QScreen. In the past twelve months [**November 1998 to October 1999**], have you traveled within Alberta on at least one overnight trip for leisure?

YES	NO	DON'T KNOW
1	2	99
(continue to Q1)	(thank and terminate)	(thank and terminate)

I would like to point out that for the purpose of this study any leisure travel within Alberta that includes at least one over-night stay away from home qualifies as a TRIP.

SECTION ONE (1) - Travel Decisions

Q1. First I would like you to tell me the 3 main influencing factors you consider when it comes to making decisions for taking trips within Alberta, remembering that we are speaking about over night leisure trips away from home. (**read list, take top 3 responses**)
Is it ....

1. budget
2. specific events
3. children's events or competitions
4. time of year
5. school schedule
6. visitors from out of town
7. job schedule
8. visits to family/friends
9. Are there any I haven't named (specify) _____

Q2. How many kilometers or hours would you travel for a short trip in Alberta (a short trip is 1-3 nights away from home)? __ Kms. __ Hrs.

Q2a. How far in advance do you plan for your short trips within Alberta? (READ)

1. Just a few hours
2. 24 hours to less than one week
3. 1 week
4. 2 weeks to a month
5. One to six months
6. Six months to a year
7. Don't Know

Q3. How many kilometers or hours would you travel for a long trip in Alberta (a long trip is 4+ nights away from home)? __ Kms. __Hrs.

Q3b. How far in advance do you plan for longer trips within Alberta? (READ)

1. Just a few hours
2. 24 hours to less than one week
3. 1 week
4. 2 weeks to a month
5. One to six months
6. Six months to a year
7. Don't Know

SECTION TWO (2) - Travel Product Perceptions

Now I would like to talk about the kinds of activities and events people take part in when they go on trips within Alberta.

Q4. I'm going to read a list of types of activities that people do on their trips. First I would like you to indicate if you have done this type of activity within Alberta and if so I would like you to name your favourite places in Alberta to do this activity and in 2 or 3 words why it is a favourite place? (Please remember trips include any leisure travel within Alberta that includes at least one over-night stay.) How about .....

a. Outdoor recreation (such as; camping, hiking, backpacking)

i. 1. YES (confirm overnight trip & continue) 2. NO (skip to next activity)

ii. In the past year, how many trips did you take where you did this activity? (write in number) _____

iii. In what months do you usually participate in these activities? J F M A M J J A S O N D

iv. What are your top three (3) favorite places in Alberta to do this activity and why it is your favorite?

1. Location_____ 1A. Why?

_____

2. Location_____ 2A. Why?

_____

3. Location_____ 3A. Why?

_____

b. Outdoor winter sports (Such as; skiing, snow boarding, snowmobiling)

i. 1. YES (confirm overnight trip & continue) 2. NO (skip to next activity)

ii. In the past year, how many trips in Alberta did you take where you did this activity?
(write in number) _____

iii. In what months do you usually participate in these activities? J F M A M J J A S O N D

iv. What are your top three (3) favorite places in Alberta you've done this activity and why it is your favorite?

1. Location_____ 1A. Why?

_____

2. Location_____ 2A. Why?

_____

3. Location_____ 3A. Why?

_____

c. Outdoor summer sports - (such as; golf, bicycle riding, quading)

i. 1. YES (confirm overnight trip & continue) 2. NO (skip to next activity)]

ii. In the past year, how many trips did you take in Alberta where you did this activity?
(write in number) _____

iii. In what months do you usually participate in these activities? J F M A M J J A S O N D

iv. What are your top three (3) favourite places in Alberta you've done this activity and why it is your favorite?

1. Location_____ 1A. Why?

_____

2. Location_____ 2A. Why?

_____

3. Location_____ 3A. Why?

_____

d. Outdoor leisure activities (Such as; bird watching, sight seeing, country fairs, farmers markets, spectator events such as air shows, rodeos, ball tourneys,)

i. 1. YES (Confirm overnight trip & Continue) 2. NO (skip to next activity)

ii. In the past year, how many trips did you take in Alberta where you did this activity?
(write in number) _____

iii. In what months do you usually participate in these activities? J F M A M J J A S O N D

iv. What are your top three (3) favourite places in Alberta to do this activity and why it is your favorite?

1. Location_____ 1A. Why?
_____
2. Location_____ 2A. Why?
_____
3. Location_____ 3A. Why?
_____

e. Museums and historic sites (such as; Tyrrell Museum, the Ukrainian Cultural Heritage Village, Heritage Park, Ft. Edmonton, Head Smashed in Buffalo Jump)

i. 1. YES (confirm overnight trip & continue) 2. NO (skip to next activity)

ii. In the past year, how many trips did you take in Alberta where you did this activity?
(write in number) _____

iii. In what months do you usually participate in these activities? J F M A M J J A S O N D

iv. What are your top three (3) favourite places in Alberta to do this activity and why it is your favorite?

1. Location_____ 1A. Why?
_____
2. Location_____ 2A. Why?
_____
3. Location_____ 3A. Why?
_____

f. Cultural activities and events (such as; music, film and theatre festivals, concerts, art galleries)

i. 1. YES (confirm overnight trip & continue) 2. NO (skip to next activity)

ii. In the past year, how many trips did you take in Alberta where you did this activity?
(write in number) _____

iii. In what months do you usually participate in these activities? **J F M A M J J A S O N D**

iv. What are your top three (3) favourite places in Alberta to do this activity and why it is your favourite?

1. Location_____ 1A. Why?

_____

2. Location_____ 2A. Why?

_____

3. Location_____ 3A. Why?

_____

g. Indoor leisure activities (e.g. shopping, casinos, nightclubs, indoor amusement and water parks)

i. 1. YES **(confirm overnight trip & continue)** 2. NO **(skip to next activity)**

ii. In the past year, how many trips did you take in Alberta where you did this activity?
(write in number) _____

iii. In what months do you usually participate in these activities? **J F M A M J J A S O N D**

iv. What are your top three (3) favourite places in Alberta to do this activity and why it is your favourite?

1. Location_____ 1A. Why?

_____

2. Location_____ 2A. Why?

_____

3. Location_____ 3A. Why?

_____

h. Visiting friends and relatives

i. 1. YES **(confirm overnight trip & continue)** 2. NO **(skip to next activity)**

ii. In the past year, how many trips did you take in Alberta where you did this activity?
(write in number) _____

iii. In what months do you usually participate in these activities? **J F M A M J J A S O N D**

iv. What are your top three (3) favourite places in Alberta to do this activity and why it is your favourite?

1. Location_____ 1A. Why?

_____

2. Location_____ 2A. Why?

_____

3. Location_____ 3A. Why?

_____

i. Resort towns and attractions (e.g. Calaway Park, West Edmonton Mall, Sylvan Lake, Banff, Jasper, Space Science Centre)

i. 1. YES **(confirm overnight trip & continue)** 2. NO **(skip to next activity)**

ii. In the past year, how many trips did you take in Alberta where you did this activity?
(write in number) _____

iii. In what months do you usually participate in these activities? **J F M A M J J A S O N D**

iv. What are your top three (3) favourite places in Alberta to do this activity and why it is your favourite?

1. Location_____ 1A. Why?

_____

2. Location_____ 2A. Why?

_____

3. Location_____ 3A. Why?

_____

SECTION THREE (3) - Travel Factors

Q5. There are a number of items that may influence people to take trips in Alberta. Could you tell me how much influence each of the following factors have on your travel decisions. On a 5 point scale where 1 means *no influence at all* and 5 means *very influential*.

How much influence does _____ have in choosing to take a trip in Alberta?

A. Quality of accommodations?

No influence at all very influential

N/A

1 2 3 4 5

97

B. Cost/value for money spent?

No influence at all very influential

N/A

1 2 3 4 5

97

C. Sense of a safe & secure environment

No influence at all very influential

N/A

1 2 3 4 5

97

D. The variety of activities offered

No influence at all very influential

N/A

1 2 3 4 5

97

E. Children's sport or competition schedules (soccer/hockey tournaments, music/dance competitions)

No influence at all very influential

N/A

1 2 3 4 5

97

F. Visiting friends and relatives

No influence at all very influential

N/A

1 2 3 4 5

97

G. Children/family oriented activities (festivals, exhibitions etc)

No influence at all very influential

N/A

1 2 3 4 5

97

H. Packages or discounts

No influence at all very influential

N/A

1 2 3 4 5

97

I. Awareness (through the media or friends)

No influence at all very influential

N/A

1 2 3 4 5

97

J. School Holidays

No influence at all very influential

N/A

1 2 3 4 5

97

K. Weather conditions

No influence at all				very influential
N/A				
1	2	3	4	5
97				

L. Small town events and attractions

No influence at all				very influential
N/A				
1	2	3	4	5
97				

M. Large city event and major attractions

No influence at all				very influential
N/A				
1	2	3	4	5
97				

Q6. Now, I am going to read you a series of statements that might be said about taking trips in Alberta. Please tell me whether you agree or disagree with each statement.

A. Our family only takes trips when the kids are out of school.

completely disagree	somewhat disagree	somewhat agree	completely agree	N/A
1	2	3	4	
97				

B. The mountains, forests and parks make a trip in Alberta special.

completely disagree	somewhat disagree	somewhat agree	completely agree	N/A
1	2	3	4	
97				

C. I prefer to travel during the off-peak season.

completely disagree	somewhat disagree	somewhat agree	completely agree	N/A
1	2	3	4	
97				

D. Not all members of our household do the same activities while on a trip.

completely disagree	somewhat disagree	somewhat agree	completely agree	N/A
1	2	3	4	
97				

E. Traveling around Alberta is difficult because of a lack of roadside amenities.

completely disagree	somewhat disagree	somewhat agree	completely agree	N/A
1	2	3	4	
97				

F. I take trips in Alberta to visit family, relatives and friends.

completely disagree	somewhat disagree	somewhat agree	completely agree	N/A
1	2	3	4	97

G. There are places in Alberta I don't take trips to because they are too expensive.

completely disagree	somewhat disagree	somewhat agree	completely agree	N/A
1	2	3	4	97

H. There needs to be more information about what there is to do in AB.

completely disagree	somewhat disagree	somewhat agree	completely agree	N/A
1	2	3	4	97

I. Alberta is safer, cleaner and less commercialized compared to other places I've traveled.

completely disagree	somewhat disagree	somewhat agree	completely agree	N/A
1	2	3	4	97

J. I like to use discount coupons to reduce the cost of activities, meals and accommodations.

completely disagree	somewhat disagree	somewhat agree	completely agree	N/A
1	2	3	4	97

K. When taking a trip I like to get away and see where the road takes me.

completely disagree	somewhat disagree	somewhat agree	completely agree	N/A
1	2	3	4	97

L. If I was more aware of what I could do in Alberta I would take more trips.

completely disagree	somewhat disagree	somewhat agree	completely agree	N/A
1	2	3	4	97

M. Information centres for tourism activities are easy to find.

completely disagree	somewhat disagree	somewhat agree	completely agree	N/A
1	2	3	4	97

N. Being part of a packaged tour group with scheduled activities is how I like to take a trip.

completely disagree	somewhat disagree	somewhat agree	completely agree	N/A
1	2	3	4	97

O. I like taking trips where I can explore and do new things in Alberta.

completely disagree	somewhat disagree	somewhat agree	completely agree	N/A
1	2	3	4	
97				

SECTION FOUR (4) - Activity Packages

Some travelers like the idea of having activity packages available when they take trips.

Q7. I'm going to read you a list of examples of activity packages that could be available for people traveling in Alberta. I would like you to tell me if you would or would not consider them.

A. A package that offered shopping, theatre, fine dining and hotel accommodations.

Would consider	Would not consider	don't know
1	2	99

B. A package that offered tickets to a special event including transportation, hotel, accommodations and some meals.

Would consider	Would not consider	don't know
1	2	99

C. A package that combined separate activities for parents and children or different members of the household.

Would consider	Would not consider	don't know
1	2	99

D. Discount packages that offer a variety of choices of activities and/or events

Would consider	Would not consider	don't know
1	2	99

E. A package that offered self-guided, site-seeing tours to outlying attractions/events, nightlife and hotel accommodations.

Would consider	Would not consider	don't know
1	2	99

F. A package that offered hiking, lodge catering, campfire gatherings and cabin accommodations.

Would consider	Would not consider	don't know
1	2	99

Q8. If you were asked to design your own package for a leisure trip in Alberta, what three (3) or four (4) items or activities would it include?

1. _____
2. _____
3. _____
4. _____

SECTION FIVE (5) - Media and Information Needs

Now I'd like you to think about how you gather information when planning a trip in Alberta.

Q9. Generally speaking, would you say you are:

1. not well informed
2. somewhat well informed
3. very well informed

about travel opportunities that exist in Alberta.

Q9a. From what sources do you obtain your information?
(DO NOT READ, CHECK ALL THAT APPLY)

1. glossy picturesque brochures
2. television
3. newspapers
4. magazines
5. internet / world wide web
6. travel agencies
7. bill boards
8. 1-800 numbers
9. Information received through the mail
10. sports event calendar
11. arts & culture event calendar
12. word of mouth
13. Tourist information centres
14. AMA
15. Other :_____

Q10. Could you tell me what type of information you look for when planning trips within Alberta?
[DO NOT READ, take up all that apply]

1. accommodations
2. transportation
3. discounts your destination
4. sporting events your destination
5. arts and cultural events/attractions
6. campgrounds & hiking trails
7. prices
8. scheduled events/festivals
9. Fishing & hunting near
10. Leisure activities near
11. Other (specify) _____

Q11. Have you read any of the following print media in the past 30 days? (read list)

A. Calgary Herald	1 yes	2 no	99 don't know
B. Edmonton Journal	1 yes	2 no	99 don't know
C. Edmonton Sun	1 yes	2 no	99 don't know
D. Calgary Sun	1 yes	2 no	99 don't know
E. Alberta Report	1 yes	2 no	99 don't know
F. Travel Magazines	1 yes	2 no	99 don't know
G. Other Local newspapers	1 yes	2 no	99 don't know
H. Globe & Mail	1 yes	2 no	99 don't know
I. National Post	1 yes	2 no	99 don't know

Q12. I am going to ask you to think about how effective the following ways are for providing you with information about destinations, activities and special events around Alberta? On a scale of 1 to 5 where 1 means *not at all effective* and 5 means *very effective*, How effective are...

		not at all effective			very effective	Don't Know
a.	glossy picturesque brochures	1	2	3	4	5 99
b.	television	1	2	3	4	5 99
c.	newspapers	1	2	3	4	5 99
d.	magazines	1	2	3	4	5 99
e.	internet / world wide web	1	2	3	4	5 99

f.	travel agencies	1	2	3	4	5
	99					
g.	bill boards		1	2	3	4
	5 99					
h.	1-800/1-888 toll free numbers		1	2	3	4
	5 99					
i.	Information received through the mail		1	2	3	4
	5 99					
j.	sports event calendar	1	2	3	4	5
	99					
k.	arts & culture event calendar	1	2	3	4	5
	99					
l.	word of mouth	1	2	3	4	5
	99					
m.	Tourist information centres		1	2	3	4
	5 99					
n.	AMA		1	2	3	4
	5 99					
o.	Accommodation guide		1	2	3	4
	5 99					
p.	Campground guide		1	2	3	4
	5 99					
q.	Bed and Breakfast listings		1	2	3	4
	5 99					

SECTION SIX (6) WORLD TRACK & FIELD CHAMPIONSHIPS

Q13. Alberta has played host to several international one-time special events such as the Calgary Olympics and the World Figure Skating Championships and others. Can you name a world-class sporting event that is being held in Alberta in the summer of 2001?

1. Yes (If the 2001 World Track & Field Championship is mentioned) *skip to Q.14*
2. No
99. Don't Know

Q13b. Have you heard of the 2001 World Championships in Athletics?

1. Yes
2. No
99. Don't Know

Q14. The 2001 World Championship in Athletics is an international track and field competition being held in Edmonton in August 2001. Over 3,000 athletes and coaches from 200 countries will participate in track and field events over the course of 10 days. Would you consider attending the events?

1. Yes → *Skip to Q. 15*
2. No
99. Don't Know

Q14b. If you knew that this was a once-in-a-lifetime event involving Olympic-calibre athletes would you now consider attending?

1. Yes → *Skip to Q. 15*
2. No
99. Don't Know

Q14c. Would you be more inclined to consider attending if you could purchase a package that included accommodations and event tickets?

1. Yes
2. No → *Skip to Q. 18*
99. Don't Know

Q15. How far in advance would you look for a schedule or ticket information?

1. Less than 6 months
2. 6 months to 9 months
3. 9 month to a year
4. More than a year
99. Don't know

Q16. How far in advance would you purchase tickets or event packages?

1. Less than 3 months
2. 3 to 6 months
3. Less than 6 months
4. 6 months to 9 months
5. 9 month to a year
6. More than a year
99. Don't Know

Q17. Would you prefer to purchase a package that included accommodation and event tickets?

1. Yes
2. No
99. Don't know

SECTION SEVEN (7) - DEMOGRAPHICS

Now a few last questions that are used for demographic classification purposes only.

Q18. Please, can you tell me what martial category I can place you in?

1. married
2. single – never married
3. common-law
4. separated
5. divorced
98. refused
99. don't know

Q19. Are there any children under the ages of 18 in your household?

1. Yes
2. No *Skip to Q.20*

Q19b. How many are? [read list, record number]

a. pre-school age (1 – 4 years old) _____

b. 5 – 12 years old _____

c. 13 – 17 years old _____

98. refused 99. Don't Know

Q20. What year were you born in? [write in year] 19____

98. refused

Q21. Which of the following categories best describes your total HOUSEHOLD income for last year? By this I mean the TOTAL income earned by all people before taxes.

1. less than $25,000
2. $25,000 to $50,000
3. $51,000 to $99,000
4. $100,000 and over
98. refused
99. don't know

Completed by Interviewer

Q22. Gender: 1. female 2. male

Thank you for participating in the Travel Trips and Activities Survey.